

23 APR 1974

MEMORANDUM FOR THE RECORD

SUBJECT: Meeting of DD/M&S Plans Officers on Monday,  
22 April 1974

1. Meeting of the DD/M&S Plans Officers opened by OC reps Messrs. [REDACTED] distributing the new OC proposed action plan reporting format (attached). Mr. [REDACTED] stated that Mr. Brownman would like a report from DD/M&S Office Directors of all R&D efforts being performed for offices by DD/S&T to include projected completion dates and costs. Negative reports are required. In response to a query, Mr. [REDACTED] said that Mr. Brownman has not indicated if reporting of action plans will be switched from a bi-monthly to quarterly basis. 25X1A9a 25X1A9a
2. Dr. [REDACTED] provided a short lecture on management by objectives (MBO). Following is a synopsis of his presentation: 25X1A5a1
  - a. MBO is basically a short and intermediate term planning system.
    - (1) The work involved and all relationships must be well thought out.
    - (2) Of great importance is the tasking of objectives to appropriate levels, i.e., into the line divisions, branches, sections.
    - (3) The role of a Planning Staff in MBO is one of facilitating and reporting.
  - b. There are three phases to MBO planning:
    - (1) Design.
    - (2) Education
    - (3) Handholding for managers.
  - c. One suggested method of making MBO work:
    - (1) Management look at the work.

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- (2) Identify roles, missions, functions.



- (3) Objectives broken down to.
- (4) Division, branch, section level.
- (5) Letters of Instruction (LOI).
  - (a) Professionals
  - (b) Sub-professionals
- (6) Results or outputs usually overstated.

d. Substitute effectiveness areas in lieu of roles, missions, functions.

- (1) Standards
  - (2) Criteria
- ↓  
Objectives

e. There is an alignment process in getting down to the division, branch, section level which will identify:

- (1) Impact on office or unit;
- (2) Any duplication of roles;
- (3) Holes and overlaps; and if
- (4) Office, division, branch, section chiefs are looking at objectives in same manner.

f. Effectiveness areas:

- (1) Innovation.
- (2) Evaluation of programs.

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- (3) Forecasting (demand for programs).
- (4) Organizational development.
  - (a) Growth of careerists.
- (5) Concept of coverage (what market?).
  - (a) Political flavor at office level.
- (6) Impact (is product mix acceptable?)
  - (a) Also political.
- (7) Strategy - extended horizon in direction for which office is headed.
- (8) Objectives related to above.

g. Increasing emphasis on the LOI.

- (1) Substantive objectives appear in the LOI.
- (2) Improvement objectives (improve product).
- (3) Developmental objectives (EEO, personnel).
- (4) Managerial objectives.
  - (a) Teaching managers.
  - (b) Training programs.

h. Phase II - how to make system become one of continuing nature.

- (1) Will line managers pick up and use on a daily basis?
- (2) If they do, this will (can) lead to longer term strategy and change structure.
- (3) In this phase Planning Staffs in a consultative role; drawing strategy; tasking various line units to perform.
- (4) Line managers must adopt system and develop a way (or ways) to manage.

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(5) Too many managers are involved with daily tasks that are not managerial in nature.

(6) Managers who complain that the MBO system does not permit time to manage are really not managing.

(7) MBO system will force managers to delegate substantive tasks to branch, section line chiefs.

(8) Must be a line system - top to bottom.

i. Objectives must be quantified at some level (if not office, then division, branch, section) or you cannot identify and report milestones.

(1) Cannot quantify some functional statements at the office level. Such objectives must be tasked to line units.

(2) Improvement objectives easiest for office managers to write.


j. Different cultures, environment and managerial values effect approach to MBO and development of objectives.

k. The LOI is the logical device to push MBO down to the mass or workers. The key -- participation.

l. The Directorates approach to MBO -- variation on a theme.

m. Play down "MBO" -- it turns people off. Talk about office management or office control system.

3. P&PS will prepare a report per the DD/M&S requirement as noted in paragraph 1 above.

  
Chief, Plans & Programs Staff, OL

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